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ABSTRACT

The development, operation, and benefits of community college alumni organizations are examined by four speakers. After J.E. McCracken's introduction to the topic, Thomas Ten Hoeve describes the alumni association at Butler County College and examines the role of the association in helping the college maintain updated files on former students and in providing scholarships for students who have transferred to upper division colleges. Patricia S. Wager then considers the factors which led to the successful development of the alumni association at the College of DuPage, including the establishment of special interest groups to compensate for the fact that community college graduates do not often identify with their class year. Next, David Dahlen discusses the creation of community/junior college alumni chapters among transfer students at Florida State University. His talk includes a description of the role played by the chapters in helping transfer students adjust to senior institutions. Finally, James L. Tennant of Jackson Community College discusses various methods of fund raising, including contributions from alumni and business, and the creation of deferred-giving and estate planning programs. (JP)

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Community/Junior College Alumni: Initiative, Influence, and Impact A NATIONAL FORUM

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)"

Dr. J. E. McCracken
Dr. Thomas Ten Hoeve, Jr.
Patricia S. Wager
David Dahlen
Dr. James L. Tennant

Papers presented at the 60th Annual Convention of the American Association of Community and Junior Colleges

San Francisco, California
March 30 - April 2, 1980

Dr. J.E. McCracken

First of all, let me welcome you to the forum presentation this morning. We are pleased that you chose to attend what we believe will be an informative session on Community/Junior College Alumni activities.

Second, I feel an explanation of why we were invited to present the forum will be of interest to you.

At the Florida Association of Community/Junior Colleege Convention last November, we conducted a similar forum dealing with the formation of CJC alumni branch chapters on State University campuses. The impact from this forum was such that the AACJC invited us to coordinate information representing a national overview of CJC alumni activities and present it at this AACJC Convention.

We requested, by letter to the principal office of each state CJC association and each state community college central office, a list of community/junior colleges which have alumni associations or that they have such colleges contact us directly. We received a multiplicity of responses which indicated interesting, creative and diverse approaches to CJC alumni activities. And, very important, the responses clearly indicated which institutions had the most effective programs and in what program areas these successes were being achieved.

This brings me to the third and vital part of the beginning of this program -- the introduction of the forum panel selected from around the nation.

The four members of the panel are representatives of institutions with outstanding alumni programs and each has different and highly successful specialty areas which truly represent a national cross section for our topic, "CJC Alumni: Initiative, Influence, and Impact."

Dr. Thomas Ten Hoeve, Jr. is President of Butler County Community College in Butler, Pennsylvania. Dr. Ten Hoeve, Jr. will address the importance of alumni projects, the organization of an alumni council and the advantages for alumni coordinated events.

Ms. Pat Wager is coordinator of Alumni Affairs for the College of DuPage in Glen Ellyn, Illinois. Ms. Wager will talk on the importance of organizing the CJC administrative liaison people for the purpose of sharing programs and information. She will also discuss the effectiveness of alumni involvement in activities such as lecture series and special interest groups.

Mr. Dave Dahlen is Director of Community College Relations at Florida State University in Tallahassee, Florida. Mr. Dahlen will discuss the philosophy of CJC Alumni Chapters at senior institutions and he will discuss methods of organization and purposes of the chapters.

Dr. James Tennant is Director of Community Development at Jackson Community College, Jackson, Michigan. Dr. Tennant will speak on ideas and methods of fund raising. He will also discuss the significance of alumni associate groups and talk about the colleges' dedication to and responsibilities for alumni affairs.

Before these people speak, we are going to take five minutes, right now, to ask you what's on your mind? What do you want to know? We could speak for an hour and not give you information you came here to get. These people will take down the questions you ask which fit in their areas of specialization and answer them in the scope of their remarks. There will also be a question, comment and answer session following the talks.

(Answers to the questions asked at this point are contained within the remarks of the forum panel).

Dr. Ten Hoeve, Jr. will speak first.

Dr. Ten Hoeve--

(The speeches follow the order in which they were presented.)

Dr. Ten Hoeve

I believe it is important, just as in the mission of the community in general, to know a bit about Butler County Community College. We are a very small community college serving a small area. And therefore the kinds of contacts and interactions that we have may be completely different from those at a multi-campus institution. Our fifteen year old institution started with its alumni efforts in 1971 when a group of interested students came to me, through contacts that I had made.

The first need was to determine, in a multi-service institution, who really is an alumnus, because you have regular students, you have night students, you have community service participants, and so forth. After arguing for a month we finally made an arbitrary decision that no one will be excluded. We made the decision that we would focus our interests on and declare an alumnus to be anyone who had either been at the institution one full semester or who had completed the equivalent of twelve hours of work, either in credit or non-credit components. This provided a working unit or focus to begin with. One of the things I believe you must accept as a basic principle, is the fact that you are dealing with an almost impossible situation. Most of your former students will not have an interest in what you are doing. That sounds like you are starting out on a negative basis but unless you can accept that fact you're never going to have it work. But if you will proceed with the idea that your interested parties will be relatively small in relation to the total members that you serve, then you will be off and running. Work with those who do have the interests.

The organizing group then decided that we should have people on the alumni counsel serving as the governing body representing a longitudinal perspective of the institution as well as the programatic part-time, full-time kinds of interests. When they organized, they decided to have a representative from each year's class on the alumni counsel, to give that longitudinal perspective as well as programatic kinds of interests. We do have one representative from each year on the governing body and in addition to that, a sophomore class representative on the governing body. To serve as that liaison, this person is appointed by the student government. That way we have a direct contact or relationship with the student government as well as with the past.

In terms of purposes, the alumni by-laws provide for sub-groups relating to special interests. The nursing students for example have a great interest in the requirement of continuing education units. Therefore we have a sub-group of nurses who have that as their singular particular interest; to see to it that they provide ongoing kinds of continuing education for them. So we provide for those kinds of sub-interest groups within the greater perimeters.

Basically we look at an alumni association as having three major functions. Let me state first of all, as preface, that the alumni at our institution are not for the purpose of legislative impact. Some of the others that you will hear may have that but we have chosen not to use it as a prime focus. Indirectly it may have some impact.

But, basically, of the three purposes, the first one as far as the institution is concerned is to assist in helping to maintain updated files of former students. This is vital, especially a small institution like ours in terms of feedback for institutional decision making. Call it follow up studies, call it anything you want, but one of the things you'll find is that these people change their addresses faster than you can imagine and to keep up is a major undertaking, even in a small institution like ours (about 1500 FTE). We also use this information not just for academic feedback but for helping determine what kinds of continuing education and community service offerings to provide. It's not just getting the address but it is also maintaining that ongoing relationship for refinement of curriculum, community service and continuing education offerings. What do they want? What do they need?

Our computer operations articulate with both our registrars records office and our continuing education records office. As this information comes in, it immediately dovetails with the efforts of the continuing education office. It also relates to those we classify as post lost alumni, those for whom we have no current address. What we find, for example, is that a person who is on our lost list may suddenly show up as a continuing education student in a given semester. That automatically feeds back into our alumni records. Then we have a current address on that person. In addition to trying to deal with lost alumni, we also have immediate feedback to our alumni office files a list of new graduates. The computer automatically prints our 3x5 index cards with the most current information on every graduating student. And that information immediately goes to alumni functional operations. In addition to that we have sub-sets of our lists that the computer gives us designating those active alumni who have, in one way or another, been involved either by sending donations, serving as representatives, attended one of the alumni activities or having supplied specific feedback to us. We use this for specialized mailing, a particular academic alumni interest. We have found this tie in, this interrelationship with the computer center, to be highly valuable.

The second purpose deals with providing scholarships. We have a good many students who want to go on to the upper division, either to a private institution, or to a state university but cannot afford to do so. Our alumni association tries to raise, through donations and fund raising projects, funds to provide six to eight scholarships per year. Along with that, of course, comes the fund raising events. And I guess my advice to you is to center the fund raising events, not necessarily a major undertaking, but in as many small activities as you can put people to work on. If somebody says I have an interest in making submarine sandwiches, put them to work. Let them try it. Others have been interested in things like fashion shows. Let them try. Don't expect a lot of money but you get their interest and you get a few dollars out of it. We tried hole-in-one golf contests and we have tried less effectively the sale of different things like art prints. One major project that our students undertook created a lot of negative PR in the community, but it sure raised a lot of money for us. They sponsored a traveling circus. In one fell swoop our alumni raised between four and five thousand dollars, for not much work.

I'll finish with the third purpose by talking about some of the kinds of interrelationships with the student body. We do not charge membership dues, but for all of those who contribute ten dollars or more we have a working agreement with our student government that will enable contributing alumni student admission rates to all the campus activities. In addition to that we provide library cards. So, there are some ongoing on-campus kinds of privileges or benefits, that are derived from their participation in the alumni association.

Patricia S. Wager

It is a pleasure to have been invited to be a member of this Alumni Forum Panel. I am extremely pleased that the AACJC has elected to investigate alumni organizations at community colleges. I have been the Alumni Coordinator at College of DuPage for seven years -- two years part-time, and five years full-time, and I believe that it has taken that long to develop a format, programs, benefits, and activities for our Alumni Association. We have a basic structure, so now our emphasis will be devoted to growth and visibility.

I think that we have been successful in the past and will continue to be successful because we have had the full support of the college administration and have been formally recognized by our college's Board of Trustees. I might add that we also have an alumni representative that sits at Board meetings with the other college constituent groups: faculty, staff, and students. I believe that having this support is vital to the success of any alumni organization. It is essential also in the planning stages that the alumni professional, Alumni Board of Directors, and the college administration have similar missions in mind for the alumni association. It is obvious that if the college president is intent on alumni financing campus construction and the Alumni Board is involved only with planning homecoming and reunions, there will be problems. In the planning stages, have the alumni association's philosophy well-defined and agreed upon. This should be a cooperative effort of the Alumni Board of Directors, staff person, and the administration.

With a philosophy in mind, placement of an alumni office administratively can be determined. Will the association be fund-raising in nature? Placement in the Development Office may be beneficial. Do you want to provide services for alumni, and in turn, organize alumni to act as a communication liaison between the college and the community? The College Relations/Community Relations may be the appropriate office placement. Do alumni want to be involved in social activities and involve students while they are on campus? A possible placement may be within the Student Activities Department. These are merely suggestions. Our alumni Association is involved in all of the previously mentioned activities, so the Alumni Office is part of our External Affairs area. I report to the Executive Officer of External Affairs, as do our Director of Development and Director of College Relations. As you can see, flexibility is a key word in alumni relations work.

Essential ingredients in initial alumni organization include analyzing the needs of your constituency. Program to meet those needs. Many of our colleagues believe community college alumni associations will not be successful because our constituency will be loyal to their four-year transfer institution. This may be true, but shouldn't we allow the alumni to decide for themselves? What about students who may receive an occupational or technical certificate and enter the business world immediately following graduation? The community college represents their only experience with college life, which is most significant. Mature students returning to school many times receive the needed encouragement and help to continue their education. To students apprehensive about returning to school, this may be a most memorable experience. Our Institutional Research Office has conduted studies that indicate over half of our working graduates are employed within our college district. Seventy-four per cent of the 1974 graduates answering a survey indicated that they live 20 miles or less from our campus. These findings indicate that our alumni are within an area that we can communicate with them easily and they should be kept informed about the college for at least public relations purposes with the community at large. This type of support in some aspects may be more beneficial to an institution than monetary support -- MAYBE.

Loyalty, no doubt, is extremely difficult or next to impossible to measure. Money is tangible, therefore, I think some community colleges organizing an alumni association abandon the cause because tangible results in many cases cannot be immediately seen. An alumni association will be an expense to the institution in salary, office supplies, office space, equipment, printing, mailing, and program expenses. An institution, therefore, must make a definite commitment for the program to function.

Fund-raising at a community college is not an impossibility -- we have engaged in various fund-raising activities -- mostly in a program-sense, through Market Days and Book Sales. Corporate giving to support our Scholarship Fund has been successful. We have just instituted a matching gift program a few months ago, so results on this project are not currently available. Dr. Tennant, I am sure, will give you a more in-depth analysis of the alumni fund-raising aspect.

The unfortunate reality of community college alumni organization is that a well-established track record has not been developed. Community colleges in our state, Illinois, are a new concept, in themselves, so alumni association programs will surely take time to develop. Because we differ from the "traditional" concept of college in the American view, we tend to attempt to fit our constituency into the college or university mold. We should avoid doing that. We have to consider our student body, our physical campus, our demographics, and our institution's mission. We can't try to measure our success on someone else's scale.

I wish I could give a formula to measure alumni success. I think this is unique to each institution, according to your goals and objectives.

In order to aid our development in the alumni area and to offer assistance to newly-emerging community college alumni associations, our Alumni Board of Directors sanctioned the organization of a one-day seminar for community college professionals in our area. We were most pleased with the attendance at our October 5, 1979, meeting, which attracted 27 individuals from 18 institutions, located in four states. Only five of the institutions represented had an organized alumni program. This certainly indicates that community colleges in our area are eager to develop alumni organizations. The seminar provided an opportunity for us to discuss our mutual strengths and challenges. It was very beneficial to dicuss topics in which all participates in attendance could participate. I have a sample of the Seminar Notebook that each participant was given that includes information on organization, constitutions, membership, fund-raising, and programs. The evaluation of the seminar was very high, which has encouraged our Alumni Board of Directors to pursue a formal organization of an area consortium of community college alumni associations. Reaction to the formation of this consortium is very positive. The results of a questionnaire sent to community colleges in a six-state area are available in a handout here. Our first meeting is being planned for the Chicago area June 17-18. We believe with periodic meetings of alumni professionals, we can begin to evaluate the alumni effort within the community college structure. Anyone intersted in receiving further information about this meeting should contact me after this session.

An organizational method which seems to have worked well for us is the development of alumni special interest groups. Class-year groups in an institution our size seem to be ineffective, since we have a total enrollment of over 18,000, with an FTE of 8,400, and only about 1,300 graduates annually. Our students don't seem to identify with their class year. The number one identification we find among alumni and students alike is their relationship with the instructors.

A special interest group naturally centers around technical/occupational graduates. First, these graduates have a common career interest. Second, they are more likely to know other alumni, since they had classes together. And third, they have a strong common tie to their instructors. Alumni in these categories should be contacted by another alumnus in the area or an instructor. This can be by letter or phone. Alumni are more apt to respond to a familiar person than the Alumni Director.

Other special interest group alumni can be derived from the athletic, theatre, or student government departments. For two years we have had a very successful reunion program with alumni who were members of our wrestling team. Each year over 65 alumni wrestlers attend this event on campus, which includes a meet and a dinner reception. The key to the success of this event is that the contact is made by an alumnus who was on the wrestling teams. This creates a favorable chain reaction effect as alumni who are contacted in turn contact other alumni and it becomes a personal invitation instead of a form letter. The function of the Alumni Office is to coordinate the activity through location, menu, awards, programs for the day, and publicity. Alumni are happy to come back to campus and be recognized and meet with fellow teammates and their coach. An outgrowth of this type of athletic organization may very well be the core for a Booster Club that could act as a fund-raising organization.

The beneficial aspect of organizing these small special interest groups is that an immediate identity is possible. Members of the affiliate groups will be members of the larger association group, therefore, this helps increase the total alumni membership.

As part of our service to alumni, the College of DuPage Alumni Association offers a Lecture Series program to our alumni as well as the community. One year we offered a nine-week series that offered one topic on one evening per week in the spring. The lectures were conducted by our faculty members. Last year the series extended nine weeks, but only three topics were discussed. Each topic was presented in a continuing three-week session, which allowed for more depth. The lecturers were community members and members of a Speakers' Bureau from the Chicago Tribune. Alumni, faculty and community participated in the free lecture held on campus.

The Lecture Series program was designed to be a minimal expense to the association. The speakers participated without a stipend, so our overhead was kept low. We found that various area industries welcomed the use of their employees who are members of their speakers' bureau. It just takes a little investigation on your part to contact these companies. Faculty members are also a willing group to share their expertise.

Another valuable resource of speakers are your own alumni. Our alumni are involved in a variety of professions, and we should utilize their talents.

I hope that I have indicated to you that our alumni are a vast untapped resource. I feel a great deal of work must be done in the alumni area and I feel that I have merely scratched the surface of potential on our campus. I would be happy to discuss alumni programming with any of you following this session. Please feel free to call on me any time at my office. It has been an honor and a privilege to be a member of this panel of distinguished individuals.

David Dahlen

We all realize that education is a process by which one develops certain levels of knowledge and understanding as a result of his/her experience throughout their lifetime. These experiences may be formal or informal, planned or unplanned, structured or unstructured, positive or negative. Nevertheless, they all contribute in one way or another to one's educational growth and development.

Education is believed to be at its best when the knowledge and understanding learned is activated and put into practice. For many, their education is most meaningful to them when they have an opportunity to help someone else achieve a level of success in their lives. People helping people, caring and sharing so that all may benefit is what it is all about.

Such is the attitude of those students who have been involved in developing Community/Junior College Alumni Chapters at The Florida State University. Groups of community/junior college students, currently enrolled at The Florida State University have organized and begun to develop active alumni chapters on the University's campus. Some assistance in the organization's initial development has been extended by the Community/Junior College Alma-mater and by the University. However, the greatest development has occurred as a result of the efforts of community/junior college alumni.

At the present time there are four community/junior college alumni chapters at Florida State University in various stages of their development. The first of its kind began its development in the Spring of 1979, when Dr. Ed McCracken, President of Okaloosa-Walton Junior College and originator of the idea, provided the impetus for Okaloosa-Walton Junior College alumni to form their beginning. Since that time, alumni from Broward Community College, Palm Beach Junior College and Gulf Coast Community College have also organized and begun developing alumni chapters.

There appears to be a number of positive benefits to all concerned for the development and growth of community/junior college alumni chapters at senior institutions. It seems that the only limit to such development would be the imagination of those involved.

The following represents some possible benefits which could result from the development of community/junior college alumni chapters at senior institutions. Your imagination can produce others.

1. Transfer Orientation Agency: Members of the alumni chapters could assist new transfers in becoming oriented to the senior institution campus. They could provide assistance in the selection of courses and instructors, in completing the registration process, in finding and settling in new housing accomodations, in completing drop and add if necessary, and in just becoming acquainted with a new environment in general.

2. Social Identification and Involvement: As recognized by some authorities, this opportunity has the potential for being the most significant influence on a student's retention at a college or university.

Alumni would have the opportunity for becoming identified and interacting with others who have like educational origins. Such associations could also provide the basis for developing other relationships outside the organization. There are of course many other benefits which could be realised as a result of individual social identification and involvement.

3. Retention Agency: Alumni members could provide peer support services in the form of personal advising, counseling, and referral. As Lee Noll of ACT points out, the most significant factor affecting retention of a student is his/her association with a person or organization on campus.

4. Transfer Outreach: Alumni members could reach out to individuals presently enrolled at the community/junior college in an effort to provide them with pertinent information for their future transfer. This could be accomplished through correspondence, during personal visits back home, and whenever prospective transfers visit the senior institution campus.

5. Transfer Advisory Agency: Alumni members could provide valuable information to the faculty, staff, and administration at the senior institution which would enable them to provide better, more appropriate service to future transfers.

6. Talent Bank: Alumni membership could provide a readily identifiable and available source of developing talent for the senior institution as well as the community/junior college.

7. A Change Agency: Alumni membership could provide a force for bringing about needed changes on the senior institution and community/junior college campuses. At the senior institution this could be accomplished through active involvement in student government and representation on senior institution committees.

Starting a community/junior college alumni chapter a senior institution and providing the impetus for its initial development is a relatively simple process.

To begin with, either the community/junior college or senior institution must make contact with the other to determine mutual interest. Once this has been determined, an assessment of the number of students currently enrolled at the senior institution must be made. This can be done by checking the current registration tapes. If it is determined that there is a sufficient number of currently enrolled students to warrant the development of an alumni chapter, a date, time and location for an inaugural meeting at the senior institution can be mutally agreed upon. Being on a quarter system, we have found that either the fall or winter quarters are the best times for a meeting, since we receive the greatest influx of transfers at these times.

Once a date, time and location have been determined, both the community/junior college and senior institution should notify students by mail of the inaugural meeting. The information, among other things, should contain the names of those who will be in attendance from each institution and words to encourage attendance. At Florida State, we always include a response card with our initial letter in order to determine approximate attendance at the inaugural meeting.

Once the students have been contacted, the senior institution, in cooperation with the community/junior college, can arrange an agenda. We have used a very simple agenda which begins with an introduction of guests by a senior institution representative. Following the introductions, a representative from the community/junior college presents a positive statement indicating the purpose for alumni development as well as encouraging and supportive statements (5-10 minutes). The representatives from the senior institution respond with their positive statements of supportive statements (5 minutes each). Following these responses, everyone takes a short refreshment break. Finally, community/junior college alumni meet with community/junior college representatives for further discussion and initial development of the chapter. We have found it to be very important for the alumni to elect officers and plan for a subsequent meeting during this time. The entire meeting usually lasts for about an hour and thirty minutes.

Immediate success of the community/junior college alumni chapter at senior institutions will depend upon the positive encouragement and initial developmental support from the faculty, staff and administration at both the community/junior college and senior institutions. Long range success will depend upon continued institutional encouragement and support, but more importantly upon the interest and enthusiasm of the chapter members.

Dr. James L. Tennant

The majority of fund-raising efforts within the community college sector remains Federal grants. Most two-year institutions pursue Federal monies on the basis of what may be obtained for already existing programs and priorities or when funding becomes available, new institutional programs or priorities are created to take advantage of this largesse.

For the longer term, JCC has found that depending upon Federal programs for the main basis for funding offers more detractions than advantages. Program continuation is subject to the whimsy of Congressional appropriations and bureaucratic regulations. These often conflict and present problems not only directly applicable to the program in question, but they frequently affect areas totally unrelated to the appropriate activity.

At this college we have gone into Federal programs, taking into consideration subsequent risks and ramifications but by far, the majority of our involvement is limited to obtaining support for college programs already in place.

Jackson Community College is unique among publicly-supported two-year colleges in that it has undertaken a commitment for private fund development. Some measure of private giving does take place at other community colleges, usually through the personal efforts of the president or the trustees of an established private foundation affiliated with the college.

We have cultivated prospective donors, established memberships among the Dahlem Center, Michigan Space Center, and the Associates and have attempted to bring a variety of our publics closer to the institution. Since 1976, we estimate that $650,000 was in capital and $673,025 was given to general purposes, totaling $1,323,025.00.

This college will continue to be primarily dependent upon state appropriations, local tax revenue, and tuition income as its primary sources of income for the foreseeable future. With this fact in mind, it is imperative that current public relations efforts be maintained or stepped up in an effort to reinforce the value of this institution to the growth and well-being of this community.

Moreover, the importance of continued close legislative liaison and lobbying - be it by the new president or other designated individual - cannot be underestimated for the future of Jackson Community College.

Other constituencies and resources we should continue to cultivate are:

Alumni. We are entering our third year of a revitalized organization. While still in the building stages, we are gradually adding more and more to participation and involvement. We have the numbers and potential but it will require much more time and effort to create the necessary organization and follow-up to make this group into a sustaining support constituency.

Dahlem Center. Ed Lueninghoener and his board have been most successful in establishing membership loyalty and programs which have attracted wide interst. It is an extremely positive group and with the proper choice of director can continue to provide measure of support for its ongoing activities and programs. For the next three years, however, it will probably not become self-sustaining.

Michigan Space Center. The revisions and additions which have occurred in the board make-up during the past year have added immensely to the guidance and potential of this organization. The Space Center is future oriented and has tremendous potential as a museum and educational facilty. When the Shuttle becomes operational, our industry and government contacts should make this very close to self-sustaining enterprise within the next three to four years.

Associates. The concept of attracting a group of substantial citizens within the community to events and activities at the college will have long-term benefits. This is particularly true if we continue to offer programs and perquisites at a charge which can ultimately profit the college.

Business and Corporations. We provide a tremendous service in the training and education of employees at all levels. In return, we do receive a measure of financial support. We should continue to cultivate this group and constantly emphasize our value to this important base. There is room for further growth here.

With the completion of the large theatre Jackson Community College will probably round out its capital building for some time to come. There may be one or two desirable building additions which could take place within the next five years but those priorities and needs will be addressed as they arise.

For the longer term, the Board of Trustees should seriously consider the establishment of an expanded endowment. By an expanded endowment I maintain that we already have a significant portfolio of assets - namely the taxpayers of Jackson County. While it may be appropriate and desirable for this college to go back to these supporters to increase the value of these assets, our history and the history for the passage of a millage increase has not been good.

We can expand our endowment in two possible ways.

Attempt another millage campaign. Because we have managed successfully and because the public attitude seems to desire that those who benefit should pay this would be an uphill struggle.

Deferred giving. Foundations and individuals rarely give to any charitable endeavor for endowment purposes. There are exceptions but in the main, most institutions of higher education rely on deferred or planned giving for this purpose.

Also known as estate planning, this form of giving takes advantage of tax provisions which allow larger gifts to the institution than would otherwise be possible.

Estate planning consists of one or a combination of the following:

1. Bequests for general and restricted purposes -- either specific amounts, or a percentage of the total estate, or the remainder or a portion of the remainder of the estate after specific amounts have been given to relatives and friends.
2. Life Insurance Policies naming the college as an owner or beneficiary.
3. Testamentary Trusts -- established under wills.
4. Living Trusts

Charitable Remainder Annuity Trusts -- provide the donor with a uniform amount of income annually during lifetime.

Charitable Remainder Unitrusts -- provide the donor with income based on fixed percentage of the net fair market value of the trust assets valued annually. Income may fluctuate with the market.

5. Gift Annuities -- the donor transfers either money or property to the college and receives in return a fixed sum regularly for the rest of the donor's life and, if wished, for the lifetime of a beneficiary.
6. Pooled Income Funds -- donor makes a gift of money or property to the institution. The gift is invested with other similar gifts. Donor receives income from the investment according to the donor's proportional share of the fund.
7. Gifts of Property -- stocks, bonds, houses, farms, other real estate, and other property such as jewelry and art objects.

There are two reasons for getting involved in this effort:

1. For the donor's own best interests. By taking advantage of estate taxes and other tax provisions and by planning the timing of the gift to coincide best with his personal situation and tax regulations, the donor can make a much larger investment than otherwise.
2. For the financial stability of the institution itself. In hard times, when gifts to current operations and capital efforts may decrease temporarily, gifts from deferred giving and estate planning take up the slack and enable the college to plan for the future with some confidence.

The effectiveness of an estate planning program depends upon:

1. Selling the prospect on the cause which will prompt the giving instead of concentrating on how to give.
2. The college's willingness to spend more time on cultivating prospects for gifts which may not be received until far in the future.
3. Someone, who is assigned the responsibility for the program, becoming conversant with the basic facts about estate planning.
4. Learning the proper way to enlist volunteer assistance from attorneys, bankers, and other professionals in the field.
5. Studied patience on the part of the administration and the trustees.

The entire program could also be viewed from the educational standpoint. Fewer than half of the adults in this country have made wills. By providing course work on wills, estate planning, and taxes, we could be providing a service as well as establish a financial base for the future.

There is a financial base in this county for the establishment of a deferred giving program. Without going into the more involved trusts, annuities or pooled income plans, we could actually begin on wills, gifts or property, or insurance plans.

We would not need to create our own literature or solicitation material. There are many good pieces available nationally. The information and training to be successful in this area does require a specialist.

On a long range basis, the payoff can be handsome. With the diverse giving opportunities represented by Jackson Community College such as the Space Center, Dahlem Center, Scholarships, the School of the Arts, and the excellence of our overall educational programs, we do have a broad range of appeal.

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